

# 6.3. Account Screen

## "All-in-One" Account Screen Details

- Customer Information
- Payments
- Account Details
- Account Status "Quick View"
- Contact Promise (Collections)
- Inquiries
- Misc Info
- Button Menu

The screenshot displays the 'All-in-One' Account Screen for customer CASTILLO, MELINDA. The interface is organized into several key sections:

- Customer Information (1):** Contains personal and account details such as Last Name (CASTILLO), First Name (MELINDA), SSN (XXX-XX-2224), Date of Birth (07/08/1970), Account # (2427-023), Home Address (9647 BONNER ST #A, CELINA, TX 77523-4445), and Employment info (SUBWAY, DO NOT CALL/CAREGIVER, Salary 3363).
- Payments (2):** A table listing payment history with columns for Pay Date, Emp#, Late, NSF, PMI, Misc, Amount, Trans, Type, Src, and Balance.
- Account Details (3):** Provides loan and account specifics including Amt Fin/Term/Loan, Hi Credit/Term, Date Made, First Pay Date, Security, and various fees.
- Contact Promise (5):** A table showing contact dates, times, codes, employee numbers, and promise dates.
- Inquiries (6):** Lists inquiry details with Date / Time, Employee, and Inquiry type.
- Misc Info (7):** Contains miscellaneous information like File (AD 30) and Privacy Opt In.
- Button Menu (8):** A row of action buttons including Pay, Pay Reverse, Credit, Renew, Fee+, Contact, Mail, Old Records, Edit, Inquiry, Comment, Documents, Previous Record, Next Record, and Exit Record.

### 1 Customer Information

Customer Information contains customer demographics information for Name & Address, SSN, DOB, Mail Settings, Residency Verification Date, Account #, 2nd Acc #, Language, Phone Numbers, Texting Status, Employment, Account Type, Joint Account Info, References, Remarks, DL#, Bank Info, Solicitation Codes, Branch & Date of First Account, Callback & Reminders, Charge-Off Status and Account Pictures. See Customer Information Section Details for more information.

### 2 Payments

Payment Section contains information for Payment Date, Employee Number, Late Fee, NSF Fee, PMI, Misc, Amount, Transaction, Type, Src, Balance and Details. See Payments Section Details for more information.

### 3 Account Details

Account Details contains loan account information for Amount Financed/Term/Totals, High Credit/Term, Date Made, First Payment Date, Security, Handling Charge, Acquisition Charge, FC Refund, Late Fee, Security Info, Balance, Payoff, First Payment, Regular Payment, Last Payment, Maturity Date, Total Payment Amount, Loan Type, Due Date, Misc Fees. See Account Section Details for more information

## **4 Account Status "Quick View"**

Loan Status "Quick View" contains the following loan information, Renew Amount Finance, Renew Hi Credit, High Credit Expires Date, Prediction Calendar, Still Due, Past Due, Past Due Since, Payment History and Age. See Loan Status "Quick View Section Details for more information.

## **5 Contact/Promise (Collections)**

Contact/Promise contains the following collection information, Contact Date & Time, Contact Code, Employee Number, Promise Date, Time and Notes. See Contact Promise Section Details

## **6 Inquiries**

Inquiries contains the following information, Date & Time of Entry, Employee ID, Inquiry and is used for Inquiries from other loan companies. See Inquiries Section Details for more information.

## **7 Misc Info**

Misc Info contains the following information, Privacy & Other Opt In/Out, File Details. See Misc Info Section Details for more Information.

## **8 Button Menu**

Button Menu contains the following, Pay, Pay Reverse, Credit, Renew, Fee+, Contact, Mail, Old Records, Edit, Inquiry, Comment, Documents, Previous Record, Next Record and Exit Button. See Button Menu Section Details for more information.